Copilot scenarios for
IT

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Overview and KPIs

KPIs play a crucial role in organizations, providing a compass to navigate toward success. Let's dive into KPIs for IT and how Copilot can assist.

Use Case by Role

Copilot can simplify the tasks that IT pros perform every day. Look at key use cases and how Copilot can be your AI assistant along the way.

Day in the Life

See how real-life IT pros are using Copilot in their day to day.

Using Copilot for Microsoft 365 in IT

Goals and challenges

IT professional's goals include, increase digital transformation, optimizing collaboration, and adopting emerging technologies like serverless computing, AI, and the Internet of Things (IoT). However, they also grapple with challenges such as the work force skills gap and reducing spending. Balancing these goals and increasing need for efficiency is essential for IT professionals to thrive in today's fast-paced technological landscape.

Copilot can assist with ...

Copilot can help to reduce the workload on IT and support staff by assisting to:

- **Create a Project Plan:** Copilot assists IT professionals with tasks such as writing, editing, summarizing, and creating data visualizations.
- **Document and Communicate Best Practice:** Copilot assists in creating comprehensive documentation. Whether it's documenting system configurations, network setups, or best practices, Copilot can generate clear and concise content.
- **Procure New IT Solution:** Copilot makes the procurement process easier for teams, by simplifying and speeding up common activities such as, communications, creating documents, or leading more productive meetings.

IT roles

- Developer and Analyst
- IT Manager
- Project Manager
- Support Specialist

Microsoft Copilot opportunity to impact key Industry KPIs

Reduce outstanding support tickets
Microsoft Copilot enhances customer support by integrating AI assistance into workflows. With AI-assistance through bots, documentation and enhanced collaboration, your support team can work together seamlessly, ensuring consistent and effective service delivery.

Decrease app downtime
Microsoft 365 Copilot is your secret weapon against app downtime. Imagine a world where issues are proactively resolved, system health is optimized, and your users experience uninterrupted productivity.

Reduce costs
Microsoft 365 Copilot offers a trifecta of cost-saving benefits for IT departments. First, by fostering increased collaboration, it streamlines knowledge sharing and problem-solving, reducing the need for redundant efforts. Second, its enhanced communication tools ensure efficient coordination among team members, minimizing delays and costly misunderstandings. Lastly, Copilot's knack for quickly identifying problems allows proactive resolution, preventing costly downtime and resource wastage.

- Accelerate growth
- Cost savings and avoidance
- Employee retention

KPI – Reduce outstanding support tickets

Imagine a scenario where customer inquiries are addressed swiftly, issues are resolved proactively, and your support team operates like a well-oiled machine. By leveraging Copilot's intelligent insights and gained efficiency, you'll be able to enhance customer satisfaction and optimize your team's productivity and resource allocation.

How Copilot can help reduce outstanding support tickets

Increase support communications and follow up efficiency:

- Have Copilot assist with emails inbound and outbound emails
- Draft email comms and announcements with Copilot
- Generate meeting notes and follow up items

Improve quality of support materials:

- Improve awareness and educational materials
- Improve quality of emails and chats
- Use Copilot to draft training guides
- Use Copilot to enhance employee handbooks
- Gets answer fast by searching internal sites and documents

Roles

- IT Service Desk Analyst
- Services Desk Managers
- Knowledge Base Curators
- Project Manager
- IT Managers

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot
- Microsoft Copilot Studio

KPI – Decrease app downtime

Imagine a world where your applications remain consistently available, seamlessly serving users without interruptions. Why is this important? Because app downtime can lead to lost revenue, frustrated customers, and damage to your brand reputation. Copilot provides your team with increased efficiency and productivity that supports them as they keep the apps running and maximizing user satisfaction.

How Copilot can help decrease app downtime

Respond to user complaint or inquiry:
- Respond quickly to inbound emails
- Access customer records for improved support
- Gets answer fast by searching internal sites and documents

Speed up internal communications:
- Draft emails with Copilot
- Draft email comms and announcements with Copilot

Save time on administrative activities:
- Generate meeting notes and follow up items

Roles

- Support Specialist
- Network Engineer
- Incident Response Team
- Cloud Architects
- Project Manager
- Developers
- Product Managers

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot
- Microsoft Copilot Studio

KPI – Decrease costs

Whether it's trimming operational expenses, streamlining processes, or maximizing the value of investments, cost reduction directly impacts profitability, competitiveness, and long-term sustainability. By strategically managing costs, businesses can allocate resources more efficiently, enhance financial stability, and remain agile in an ever-evolving market.

How Copilot can help reduce costs

Create internal feedback loop to identify cost saving areas:

- Draft employee surveys focused value of resources utilized and ideas for cost savings
- Analyze surveys to gain valuable insights into what makes employees happy or areas that need improvement within the organization

Improve employee efficiency and productivity:

- Have Copilot assist with emails and document drafts
- Save time on administrative activities such as generating meeting notes and follow up items

Roles

- Chief Information Officer
- IT Managers
- Procurement Specialist
- IT Operations team

Microsoft AI solutions

- Copilot for Microsoft 365
- Microsoft Copilot

Use Case | Create a Project Plan

Potential benefits Decrease Costs

1. Summarize Requirements and Data

Leverage Copilot to summarize all requirements and related data to build the framework for the project.

Copilot
Copilot in Word

Clearly outline the project's purpose, goals, and deliverables using Copilot in Word.

2. Discuss the plan

Meet with the team to discuss the project plan and delegate responsibilities to team members based on their expertise.

Copilot in Teams

Summarize the meeting and list the action items discussed and their status using Copilot in teams.

3. Brainstorm risks

Whiteboard potential risks with the team and leverage Copilot to create an initial list and categorize all the items at the end of the session.

Copilot in Loop
Copilot in Word

Incorporate all categorized items into original project plan document using Copilot for Word.

6. Revise support procedures

After project is completed, use Copilot to revise procedures and change management documents for support teams and admins.

Copilot in Word

Ensure high writing quality using Copilot to revise first drafts.

5. Create an executive update

Create a presentation to brief the CIO on the project status and results. Use Copilot to create slides based on the project plan.

Copilot in PowerPoint

Create a presentation from Project Plan Word document.

4. Coordinate updates

Coordinate all update activities in a Teams channel. Produce summaries to channel activities each morning to stay up to date.

Copilot
Copilot in Teams

Stay informed on project activities by using Copilot to summarize communications.

Use Case | Document and Communicate Best Practices

Potential benefits   (Skill Development)   (Increased Job Satisfaction)   (Faster Completion Times)   (Improved Documentation Quality and Accuracycy)

1. Document Solution

Craft document that outline steps for best practice. In addition, add specific results generated from solution.

Copilot in Word

Quickly make create draft and pull in data from data sources to support outcomes.

2. Get Customer Information

Using plugins built in Copilot Studio, easily access CRM information to pull customer information that supports best practice impact, such as opportunity pipeline and customer revenue.

Copilot Studio in Copilot for Microsoft 365

Rapidly gather critical information to support newly identified best practice.

3. Brainstorm Ideas

Create list of ideas to optimize best practice. Leverage Copilot to create an initial list. Then categorize all the items at the end of the session.

Copilot in Loop

Accelerate your project as you plan and collaborate easier with Copilot in Loop.

6 Revise support procedures

Based on the Leadership teams comments revise best practice documents for future use.

Copilot in Word

Quickly make summarize LT feedback to improve the quality of the best practice documentation.

5. Create an executive update

Create a presentation to brief the Leadership Team on this new best practice. Use Copilot to create slides based on the project plan.

Copilot in PowerPoint

Create a presentation from best practice documentation located in Word.

4. Summarize conversations

Prepare communication and incorporate summaries and action items from previous meeting.

Copilot in Outlook
Copilot in Word

Summarize and the latest conversations and assign action items.

Use Case | Procure New IT Solution

Potential benefits   (Reduce Costs)

1. Gather Business Requirements

Aggregate multiple threads of conversations to create a wholistic view of all essential business requirements for the new solution.

Copilot in Teams

Be present during the meeting by relying on Copilot in Teams for transcription and summary.

2. Research Solutions

Quickly identify and summarize existing solutions in market with Microsoft Copilot.

Copilot

Save time and increase accuracy by asking Copilot to prepare a summary of information gathered from multiple sources.

3. Create a Build vs. Buy Analysis

Compile quotes from vendors and work with internal development teams to build a variance analysis with Copilot In Excel.

**Copilot in Excel
Copilot in Whiteboard**

Leveraging the variance analysis, whiteboard the pros and cons for each solution. Utilize Copilot in Whiteboard to categorize the initial list.

6. Create and Send Launch Communication

Use Copilot in Outlook to easily draft an email announcing the new solution and thanking contributors.

Copilot in Outlook

Use Copilot to review your email to ensure that is clear, concise, and impactful.

5. Summarize weekly status meeting

Hold status update meetings to track the procurement process. Use Copilot to summarize each meeting and list open items

Copilot In Teams

During the meeting you can ask Copilot for suggestions on questions to ask or next steps to discuss to keep the conversation on track.

4. Create Solution RFP

Draft RFP to the selected vendors using Copilot to take content from your emails, meeting notes, and presentations.

Copilot in Word

Document and socialize the RFP to ensure all business requirements are being met, and all necessary approvals have been received.

A day in the life of a Launch Infrastructure Manager

8:00 am

Jeff begins his day wanting to get caught up on a few meetings he missed the day before. He also asks Copilot to provide a list of open Jira assigned to him using plugins built in Copilot Studio.

Copilot

Summarize meeting notes and actions for meetings recorded yesterday and call out any specific actions called out for me.

9:30 am

He later has a regular 1:1 with a business stakeholder and wants to prep for the meeting. He knows there a number or key topics to discuss that came through email, Teams, and various documents.

Copilot

Summarize the emails, Teams messages, and documents and be sure to list all asks and actions that need to be discussed or closed out.

10:00 am

Jeff is working with a team on a proposal to transform a launch process. He received a 40+ PowerPoint deck on the proposal but wants to share a whitepaper with his stakeholder audience.

Copilot in Word

Generate whitepaper from PowerPoint with the following key headings and be clear on next steps and schedule.

4:00 pm

After completing his review of the engineering scenarios, he utilizes copilot to draft PPT to share with key stakeholders the next week.

Copilot in PowerPoint

Draft PowerPoint deck with content from the excel and create summary slides for the launch process proposal based on the word document.

2:00 pm

Switching gears, Jeff wants to review the list of submitted engineering scenarios that have come in across the organization as the final review is next week.

Copilot in Excel

Summarize engineering scenarios by key initiative, impact category and financial value in a table.

11:00 am

After creating the whitepaper, Jeff wants some help drafting a mail to his stakeholders to get feedback on the whitepaper so utilizes copilot.

Copilot in Outlook Copilot Studio in Copilot for Microsoft 365

Draft an email to my stakeholders with this content ensuring it is clear and actionable on next steps.
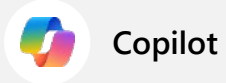
Jeff
a Launch Infrastructure Manager in Finance

A day in the life of an IT Administrator

Will is an IT Administrator at Contoso

7:30 am
Will arrives at the office and commands Copilot to check his emails and chats for any urgent issues. He uses Copilot in Outlook to draft replies confirming resolution for each issue.

Copilot

Summarize any incidents that have been reported last night from my email and chat messages.

8:00 am
He attends the daily standup to discuss priorities for the day. During the meeting Will uses Copilot to check for unanswered questions.

Copilot in Teams

Tell me if there are any unanswered questions and make some suggestions for questions that should be asked.

9:00 am
With no system issues to work on now, Will can revise a project plan. He commands Copilot to fill in some missing sections.
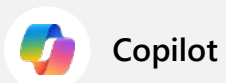
Copilot in Word

Create a paragraph on system setting changes from the Fabrikam system upgrade documentation.

1:30 pm
Will revises his presentation for a meeting with HR on his recommendations for a new employee experience solution that HR has requested. He uses Microsoft Copilot to summarize the product website and then turns it into a slide.

Copilot in PowerPoint

Add a slide based on [copy summary of the web site]

3:00 pm
Will returns to Teams to catch up on a meeting he missed when he had to troubleshoot a server issue. He checks out the recap and asks for the key points and action items.

Copilot in Teams

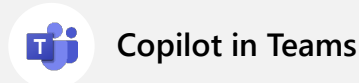**Summarize this meeting** and provide the key points and action items

4:00 pm
At the end of the day Will has some time to research new devices for the next laptop upgrade. He commands Copilot to produce a report on the best laptops for business users.

Copilot

What are the most popular laptops for enterprise organizations this year?